



***OPERATIONS GUIDE #ADM-030***

***MAILING LABELS***

### **MAILING LABELS**

**PURPOSE:** To provide information on how to develop and print club member mailing labels.

**SCOPE:** The information in this guide is for use by all personnel who have a need to develop and print mailing labels.

**GENERAL:** The instructions in this operational guide are provided as an “addendum” to the information contained in Club Works User’s Guide to clarify procedures that should be used to develop and print club membership mailing labels. It provides detailed instructions on selecting the template to be used to produce the labels, developing the mailing label report, and creating the actual mailing labels.

### **GUIDANCE:**

See attached procedures for detailed instruction on the three-step process to develop and print club membership mailing labels.

### **SUMMARY:**

Preparing mailing labels involves the development of a membership information report (Excel spreadsheet) via Club Works, which contains the names, and addresses of all club members. The information in the report is then transferred to a Microsoft Word label “template” to allow printing of actual mailing labels.

## **Developing and Printing Mail Labels**

The following instructions will assist you in developing and printing mailing labels for your membership. Preparing your mailing labels is a three-step process which involves:

- a. *Selecting* the template you want to use to produce your mailing labels (either two-row format or three-row format)
- b. *Developing* the mailing label report that contains the names and addresses of your members via Club Works
- c. *Creating* the actual mailing labels using the Microsoft Word “mail merge” function

### **Section I – Selecting a Mail Label Template**

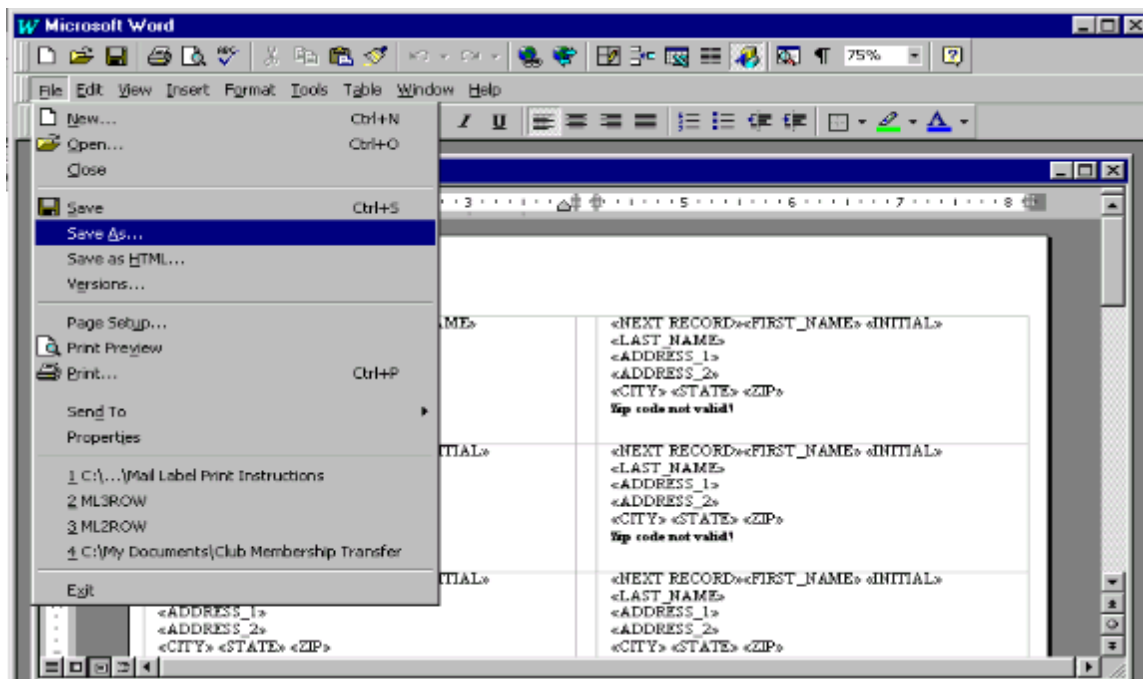
1. Templates are used to produce 8"x11 ½" sheet of labels (depending upon your requirement)

<code>&lt;FIRST_NAME&gt; &lt;INITIAL&gt; &lt;LAST_NAME&gt; &lt;ADDRESS_1&gt; &lt;ADDRESS_2&gt; &lt;CITY&gt; &lt;STATE&gt; &lt;ZIP&gt;      </code>	<code>&lt;NEXT RECORD&gt;&lt;FIRST_NAME&gt; &lt;INITIAL&gt; &lt;LAST_NAME&gt; &lt;ADDRESS_1&gt; &lt;ADDRESS_2&gt; &lt;CITY&gt; &lt;STATE&gt; &lt;ZIP&gt;      </code>
<code>&lt;NEXT RECORD&gt;&lt;FIRST_NAME&gt; &lt;INITIAL&gt; &lt;LAST_NAME&gt; &lt;ADDRESS_1&gt; &lt;ADDRESS_2&gt; &lt;CITY&gt; &lt;STATE&gt; &lt;ZIP&gt;      </code>	<code>&lt;NEXT RECORD&gt;&lt;FIRST_NAME&gt; &lt;INITIAL&gt; &lt;LAST_NAME&gt; &lt;ADDRESS_1&gt; &lt;ADDRESS_2&gt; &lt;CITY&gt; &lt;STATE&gt; &lt;ZIP&gt;      </code>
<code>&lt;NEXT RECORD&gt;&lt;FIRST_NAME&gt; &lt;INITIAL&gt; &lt;LAST_NAME&gt; &lt;ADDRESS_1&gt; &lt;ADDRESS_2&gt; &lt;CITY&gt; &lt;STATE&gt; &lt;ZIP&gt;      </code>	<code>&lt;NEXT RECORD&gt;&lt;FIRST_NAME&gt; &lt;INITIAL&gt; &lt;LAST_NAME&gt; &lt;ADDRESS_1&gt; &lt;ADDRESS_2&gt; &lt;CITY&gt; &lt;STATE&gt; &lt;ZIP&gt;      </code>

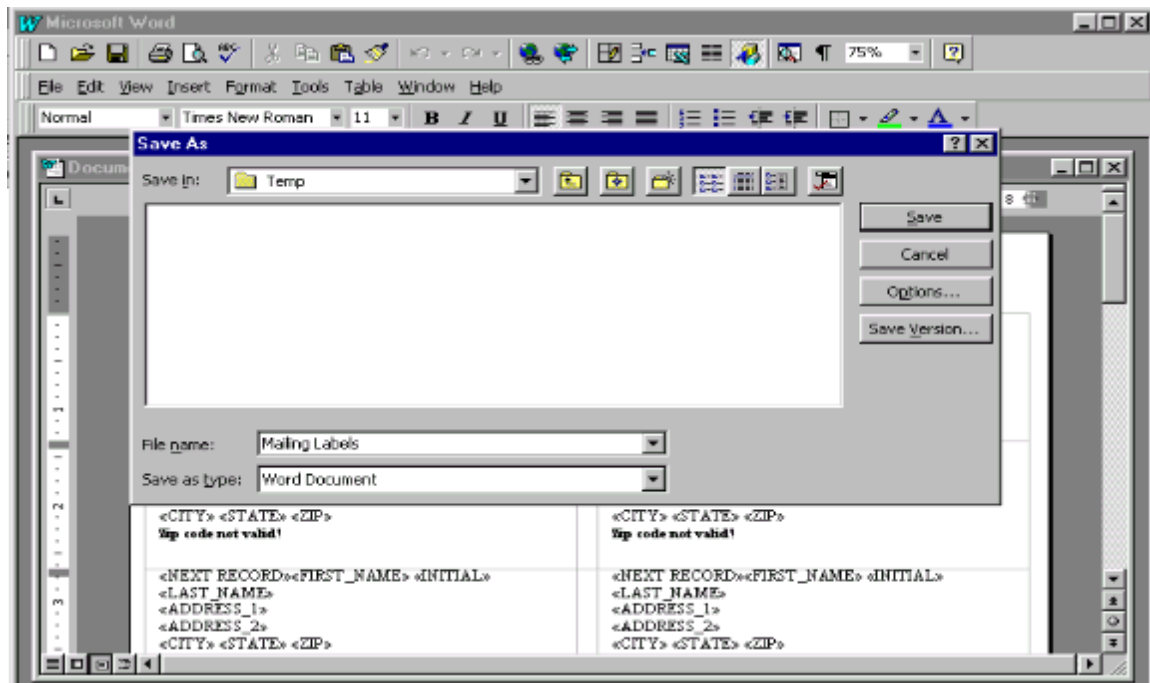
- They can be developed from the two-row template
- If you do not already have the templates, call the Services Agency at DSN 487-2353 to obtain them

<FIRST_NAME> <INITIAL> <LAST_NAME> <ADDRESS_1> <ADDRESS_2> <CITY> <STATE> <ZIP> <b>Zip code not valid!</b>	<FIRST_NAME> <INITIAL> <LAST_NAME> <ADDRESS_1> <ADDRESS_2> <CITY> <STATE> <ZIP> <b>Zip code not valid!</b>	<FIRST_NAME> <INITIAL> <LAST_NAME> <ADDRESS_1> <ADDRESS_2> <CITY> <STATE> <ZIP> <b>Zip code not valid!</b>
<FIRST_NAME> <INITIAL> <LAST_NAME> <ADDRESS_1> <ADDRESS_2> <CITY> <STATE> <ZIP> <b>Zip code not valid!</b>	<FIRST_NAME> <INITIAL> <LAST_NAME> <ADDRESS_1> <ADDRESS_2> <CITY> <STATE> <ZIP> <b>Zip code not valid!</b>	<FIRST_NAME> <INITIAL> <LAST_NAME> <ADDRESS_1> <ADDRESS_2> <CITY> <STATE> <ZIP> <b>Zip code not valid!</b>
<FIRST_NAME> <INITIAL> <LAST_NAME> <ADDRESS_1> <ADDRESS_2> <CITY> <STATE> <ZIP> <b>Zip code not valid!</b>	<FIRST_NAME> <INITIAL> <LAST_NAME> <ADDRESS_1> <ADDRESS_2> <CITY> <STATE> <ZIP> <b>Zip code not valid!</b>	<FIRST_NAME> <INITIAL> <LAST_NAME> <ADDRESS_1> <ADDRESS_2> <CITY> <STATE> <ZIP> <b>Zip code not valid!</b>
<FIRST_NAME> <INITIAL> <LAST_NAME> <ADDRESS_1> <ADDRESS_2> <CITY> <STATE> <ZIP> <b>Zip code not valid!</b>	<FIRST_NAME> <INITIAL> <LAST_NAME> <ADDRESS_1> <ADDRESS_2> <CITY> <STATE> <ZIP> <b>Zip code not valid!</b>	<FIRST_NAME> <INITIAL> <LAST_NAME> <ADDRESS_1> <ADDRESS_2> <CITY> <STATE> <ZIP> <b>Zip code not valid!</b>

- They can be developed from the three-row template
2. Using the two-row or three-row templates included in your “label information package,” save the label templates to a folder, e.g. (C:\TEMP)



3. To do so:
- Select “File”
  - Click on “Save As...”



4. Determine where you want to save the file by using the drop down arrow in the “Save in” box
5. Give the file a name by entering the name in the “File Name” box
6. Click on “Save”
7. You can now close the screen

## Section II – Developing the Mailing Label Information Report



The login form features a dark blue header with the "FIRST USA®" logo and the text "Welcome to Club Works". Below this is a black box labeled "LOGIN". The form includes two input fields: "Username:" and "Password:". The "Password:" field is highlighted in yellow. A "Submit" button is located below the password field.

Click [here](#) if you forget your username/password.

### 1. Log onto Club Works

- Enter your Username and Password – click on “Submit”



The main menu features a dark blue header with the "Club Works" logo and a "LOG OFF" button. Below the header is a navigation bar with links: [MODE] [FAQ] [HELP] [LOGOFF] [HOME]. The "daily status" link is highlighted in yellow. Below the navigation bar is a "Home" link.

## **Welcome to Club Works!**

### 2. Select “Reports”



## Reports

[Card Member Reports](#)

[Club Member Reports](#)

[Application Reports](#)

[Transaction Reports](#)

[Merchant Reports](#)

[Mailing Labels](#)

3. Select "Mailing Labels"



4. Select "Club Member Mailing List" from the Select Mailing List drop down window



[LOG OFF](#)  
**Club Works**  
[\[MODE\]](#) [\[FAQ\]](#) [\[HELP\]](#) [\[LOGOFF\]](#) [\[HOME\]](#)

daily status	member lookup	application processing	membership maintenance	financial transactions	reports	administration
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Home > Reports > Mailing List

**SELECT MAILING LIST**

Address List: Club Member Mailing List

- Click on “Next”



[LOG OFF](#)  
**Club Works**  
[\[MODE\]](#) [\[FAQ\]](#) [\[HELP\]](#) [\[LOGOFF\]](#) [\[HOME\]](#)

daily status	member lookup	application processing	membership maintenance	financial transactions	reports	administration
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Home > Reports > Mailing List > Club Member Mailing List

**LABEL OPTIONS**

Club: \* Select Item

Birth Month: \* Select Item

Restriction: \* xxxxxx ENL CLUB  
xxxxxx O CLUB  
xxxxxx OFF SPOUSE CLUB

Restrict To: \* Select Item Above

- Under the “Labels Option” box
  - Select the appropriate club





[LOG OFF](#)  
**Club Works**  
[\[MODE\]](#) [\[FAQ\]](#) [\[HELP\]](#) [\[LOGOFF\]](#) [\[HOME\]](#)

daily status	member lookup	application processing	membership maintenance	financial transactions	reports	administration
--------------	---------------	------------------------	------------------------	------------------------	---------	----------------

Home > Reports > Mailing List > Club Member Mailing List

**LABEL OPTIONS**

Club: \* [xxxxxx 0 CLUB ▼]

Birth Month: \* [Select Item ▼]

Restriction: \* [Select Item ▼]

Restrict To: \* [January ▼]  
 [February ▼]  
 [March ▼]  
 [April ▼]  
 [May ▼]  
 [June ▼]

- In the “Birth Month” box, select “All Months”



[LOG OFF](#)  
**Club Works**  
[\[MODE\]](#) [\[FAQ\]](#) [\[HELP\]](#) [\[LOGOFF\]](#) [\[HOME\]](#)

daily status	member lookup	application processing	membership maintenance	financial transactions	reports	administration
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Home > Reports > Mailing List > Club Member Mailing List

**LABEL OPTIONS**

Club: \* [xxxxxx 0 CLUB ▼]

Birth Month: \* [All Months ▼]

Restriction: \* [Select Item ▼]

Restrict To: \* [Select Item ▼]  
 [No Restriction ▼]  
 [Card Type ▼]  
 [Rank ▼]  
 [Member Type ▼]  
 [Account Status ▼]

- In the “Restriction” box, select “Account Status”




LOG OFF  
**Club Works**  
 [MODE] [FAQ] [HELP] [LOGOFF] [HOME]

daily status	member lookup	application processing	membership maintenance	financial transactions	reports	administration
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Home > Reports > Mailing List > Club Member Mailing List

**LABEL OPTIONS**

Club: \* [xxxxxx 0 CLUB ▼]

Birth Month: \* [All Months ▼]

Restriction: \* [Account Status ▼]

Restrict To: \* [Select Item ▼]

Select Item  
 ACTIVE  
 INACTIVE

- In the “Restrict To” box, select “Active”




LOG OFF  
**Club Works**  
 [MODE] [FAQ] [HELP] [LOGOFF] [HOME]

daily status	member lookup	application processing	membership maintenance	financial transactions	reports	administration
--------------	---------------	------------------------	------------------------	------------------------	---------	----------------

Home > Reports > Mailing List > Club Member Mailing List

**LABEL OPTIONS**

Club: \* [xxxxxx 0 CLUB ▼]

Birth Month: \* [All Months ▼]

Restriction: \* [Account Status ▼]

Restrict To: \* [ACTIVE ▼]

- Click on “Submit”

https://www.club-works.com/Download - Microsoft Internet Explorer

File Edit View Insert Format Tools Data Go Favorites Help

Back Forward Stop Refresh Home Search Favorites History Tools Mail Print Edit

Address <https://www.club-works.com/Download> Go Links »

	A	B	C	D	E	F	G	H	I	J
	First Name	Initial	Last Name	Address 1	Address 2	City	State	Zip	Country	
1	Joseph	X	Xxxxxxx	123 Xxx Xxxx St.		Xxxxxxxx	XX	00000-0000	USA	
2	Martin	X	Xxxx	925 XXXXXXXXXX Lane		Xxxx Xxxx	XX	00000-0000	USA	
3	Michael	X	Xxxxxxxx	1001 Xxxxx St.		Xxxxxxxx	XX	00000-0000	USA	
4	James	X	Xxxxx	16554 Xxx XXXXXXX Ave.		Xxxxx	XX	00000-0000	USA	
5	Brian	X	Xxxxxxxx	2649 Xxxx Xxx Rd.		Xxxxxxxx	XX	00000-0000	USA	
6	Marguerite	X	Xxxxx	1863 XXXXXXXXXX St.		Xxxx XXXXXX	XX	00000-0000	USA	
7	Thomas	X	Xxxxx	456 XXXXX XXXXX St.		Xxxxxxxx	XX	00000-0000	USA	
8	Gabriel	X	Xxxxxxxx	321 XXXXXX Blvd.		Xxxxx	XX	00000-0000	USA	
9	Danny	X	Xxxx Xxxx	758 Xxx XXXXX		Xxx XXXXXXX	XX	00000-0000	USA	
10	Michael	X	Xxxxxxxx	94376 XXXXXXX		Xxxxxxxx	XX	00000-0000	USA	
11	John	X	Xxxxx	9782 XXXXXX XXXXX Way		Xxxxxxxx	XX	00000-0000	USA	
12	Darryl	X	Xxxxx	16098 XXXXXX Blvd.		Xxxxx	XX	00000-0000	USA	
13	John	X	Xxxxxxxx	5375 Xxxx Ave.		Xxxx Xxx	XX	00000-0000	USA	
14	William	X	Xxxxxxxx	786 Xxxx XXXXXXX St.		Xxxx	XX	00000-0000	USA	
15	Jeffrey	X	Xxxxx	2949 XXXXXXXXXX Lane		Xxxx XXXXXXX	XX	00000-0000	USA	

**Note:** This will produce your mailing label information report in a Microsoft Excel spreadsheet format.



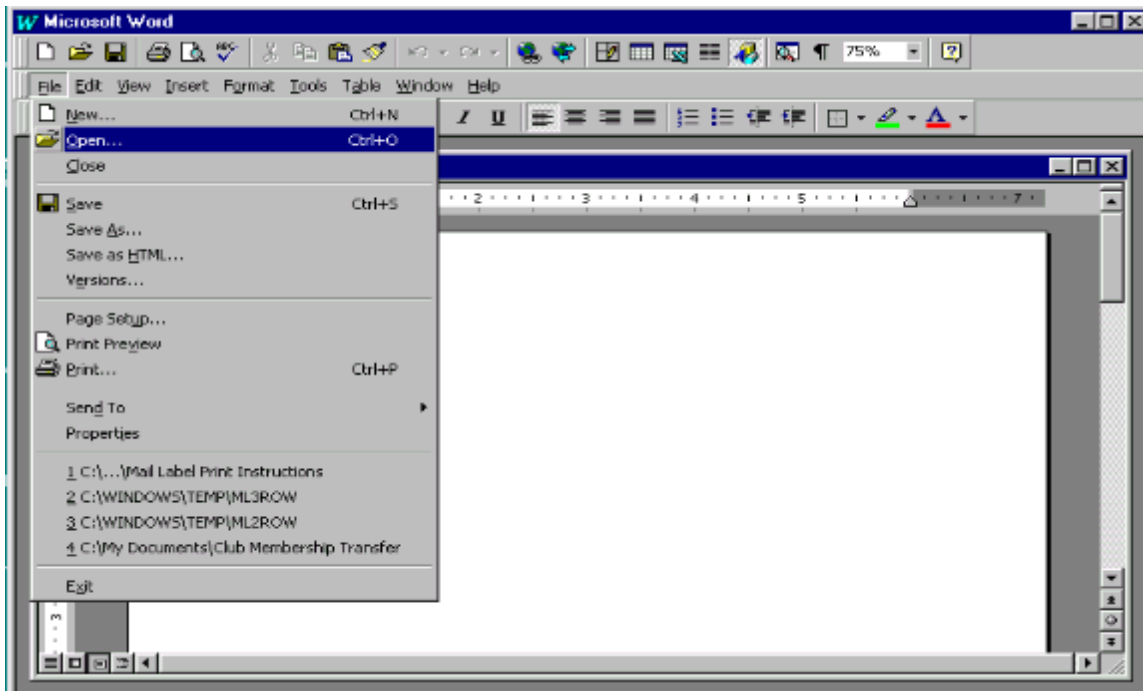
## 6. Select "File"

- Click on "Save As," give the file a name and save to a folder that you will remember at a later time.

## 7. This completes the actions required to develop the mailing label information report

- You can now close the screen

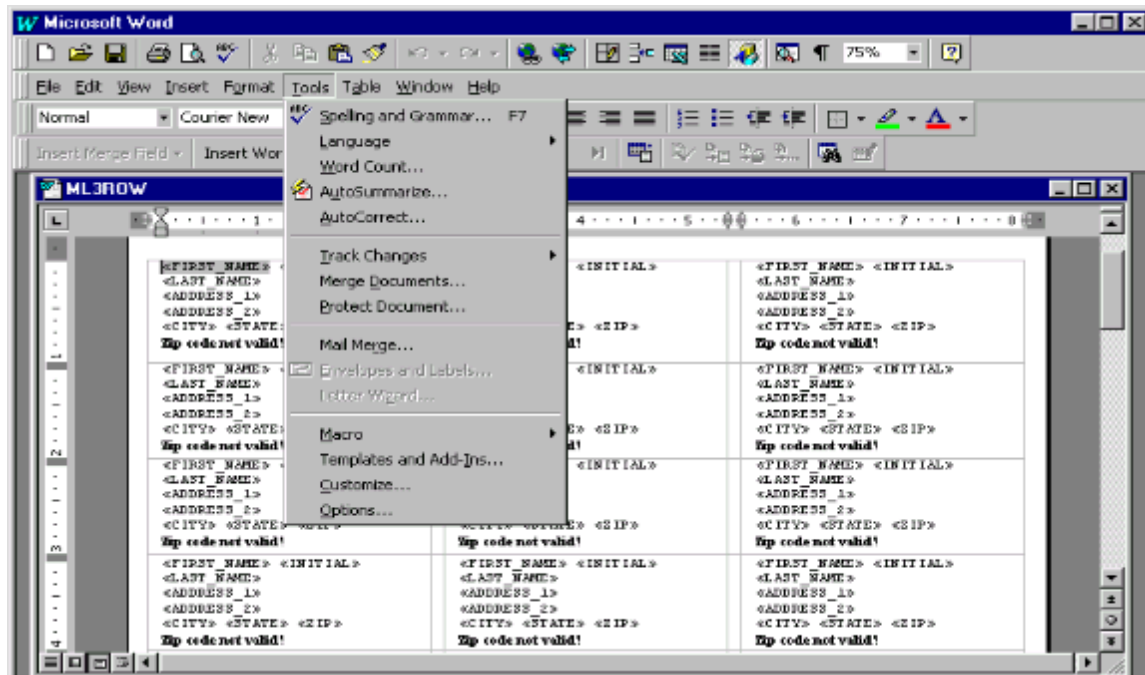
### Section III – Creating the Mailing Labels



#### 1. Open your Microsoft Word

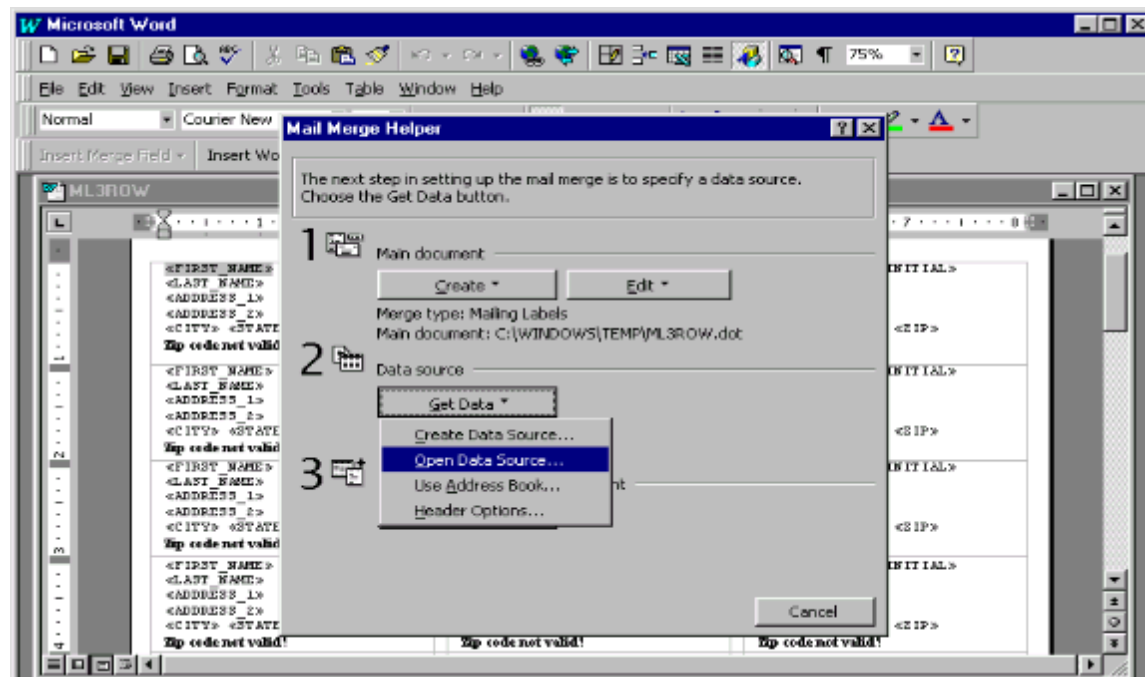
- Select "File"
- Open the applicable Microsoft Word template file (two or three row) you saved earlier under Section I

**Note:** If the message "*filename.dot* is a mail merge main document. Word cannot find its data source, *filename.xls*" is displayed, select "Options" then select "Remove all merge info"



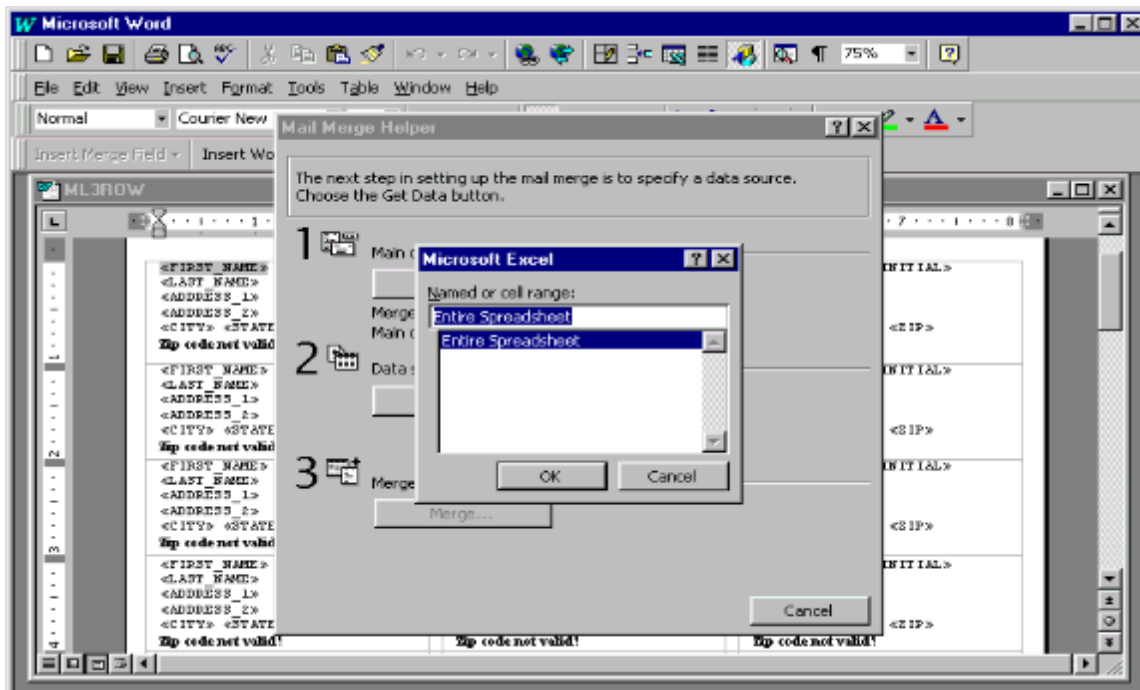
2. Select "Tools"

- Click on "Mail Merge"

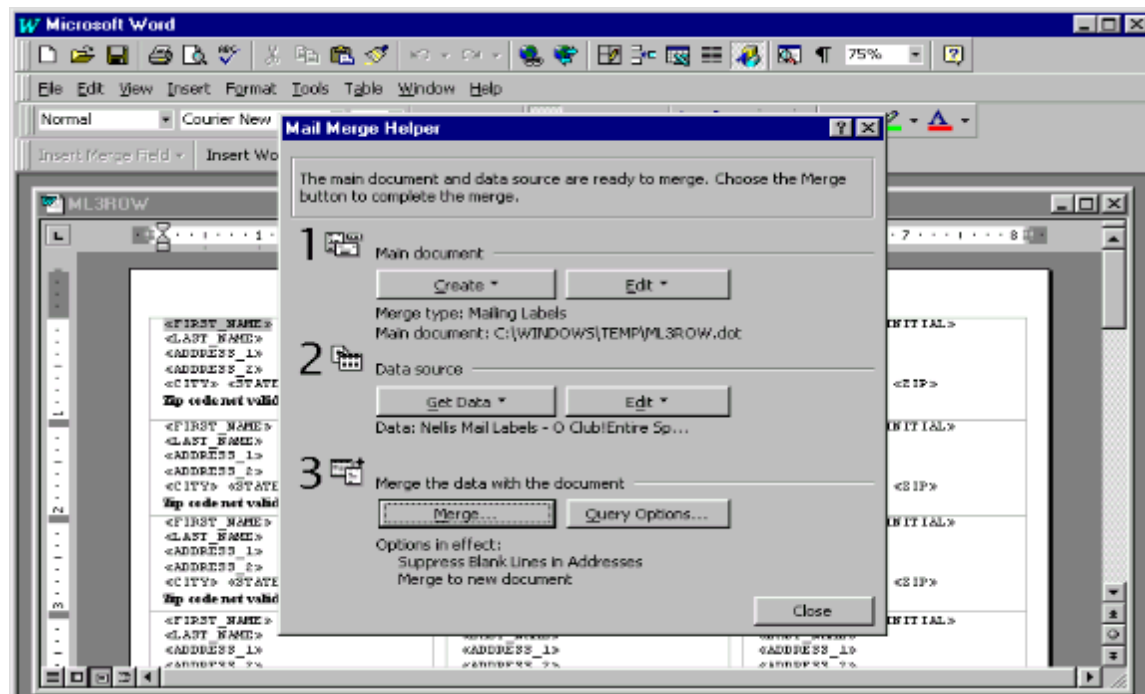


3. At the #2 function, select "Get Data"

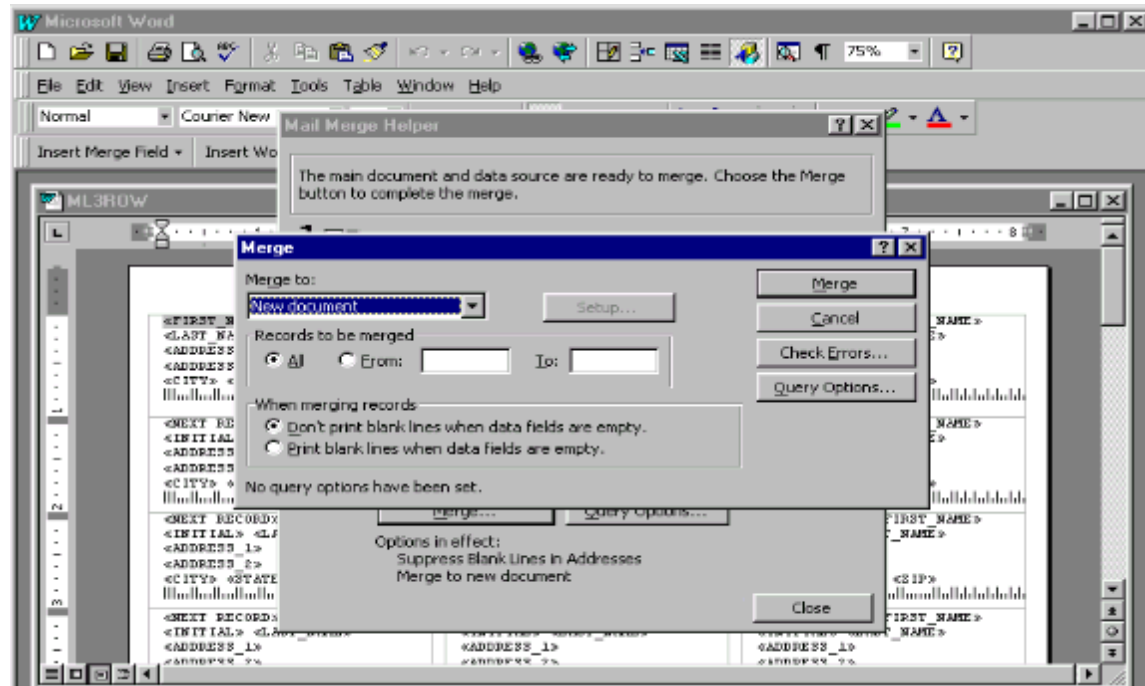
- Then click on “Open Data Source”
- 4. Go to the folder you saved the Excel spreadsheet label information data in under Section II
- Note:** Select “\*XLS” file types
- 5. Select and open the filename containing your Excel spreadsheet label data report



- 6. Select “OK” at the “Entire Spreadsheet”



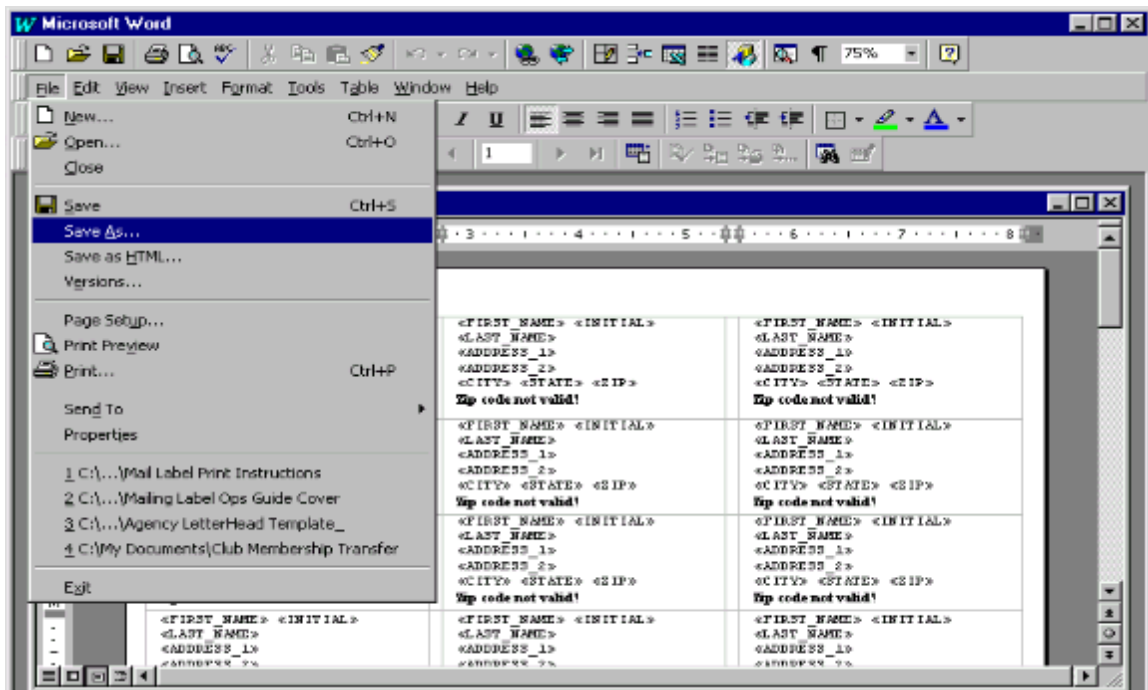
7. At the #3 function, select “Merge”



- Then click on “Merge” again

8. The data will now import into your mail label template for printing

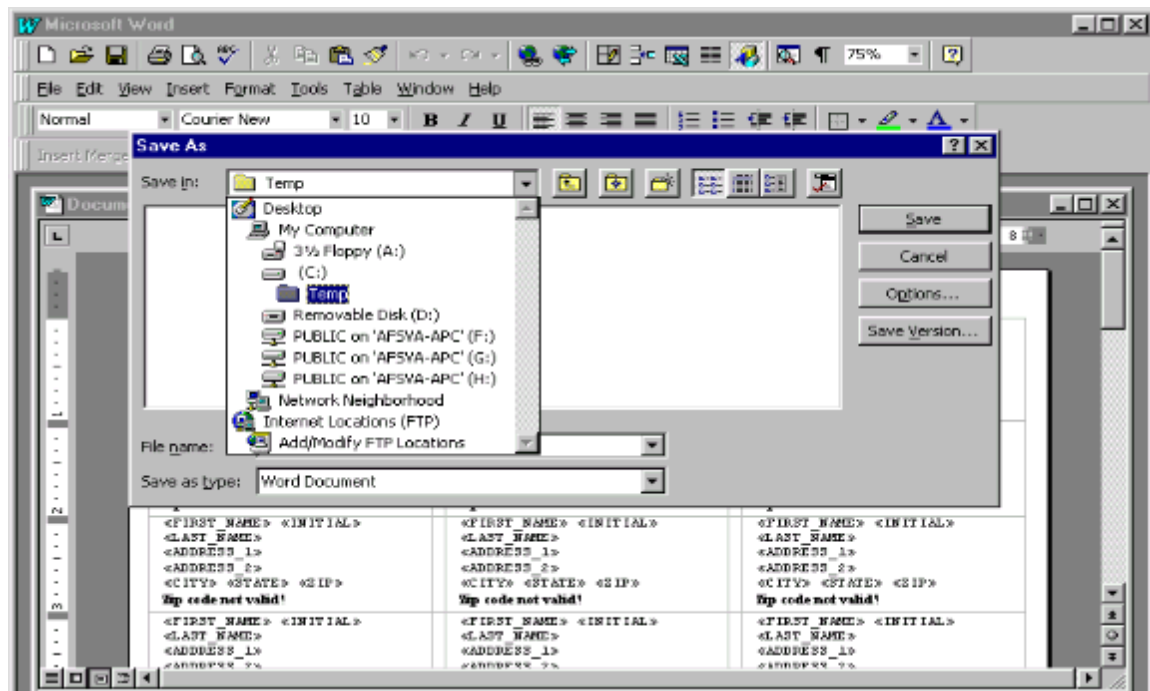
9. Recommend you save the completed mailing labels to a file



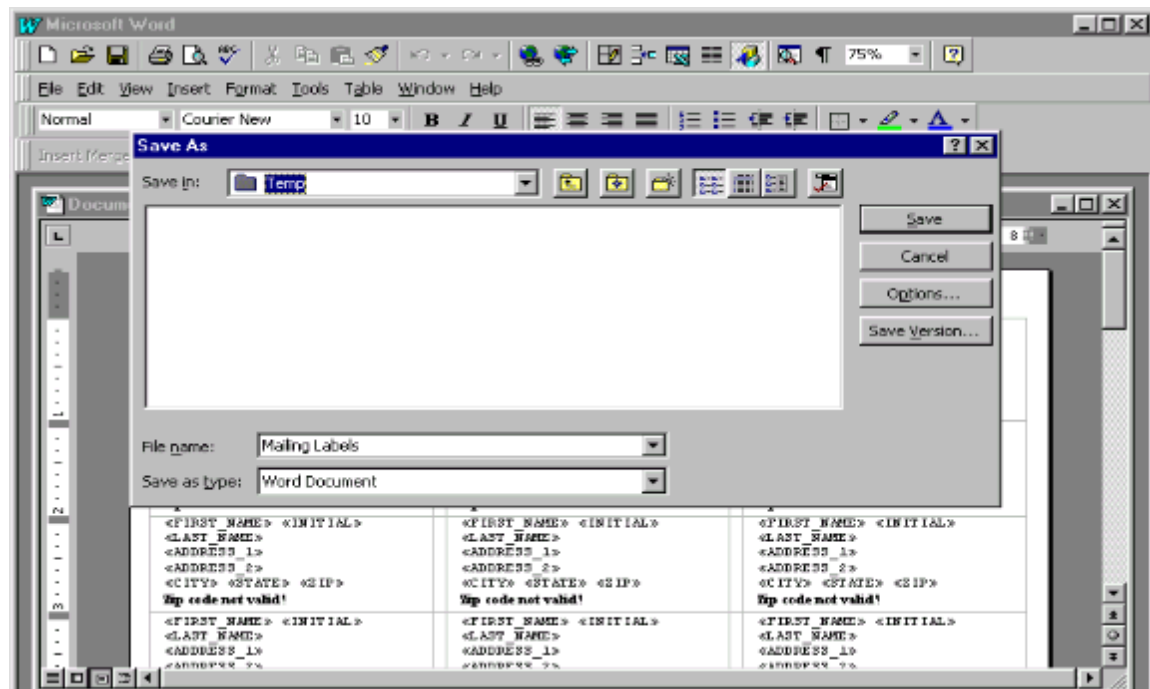
- Select "File"
- Click on "Save As..."

**Note:** The mailing label template shown above and in the next several screen prints is for illustration purposes only. The actual mailing labels will contain the names and addresses of your members.





- Determine where you want to save the file by using the drop down arrow in the “Save in” box

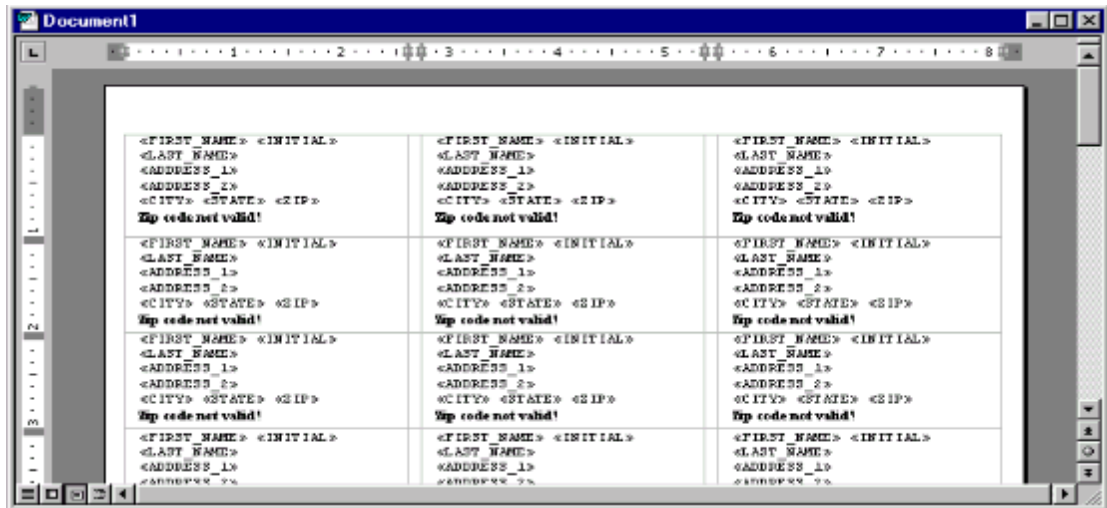


- Give the file a name by entering the name in the “File Name” box

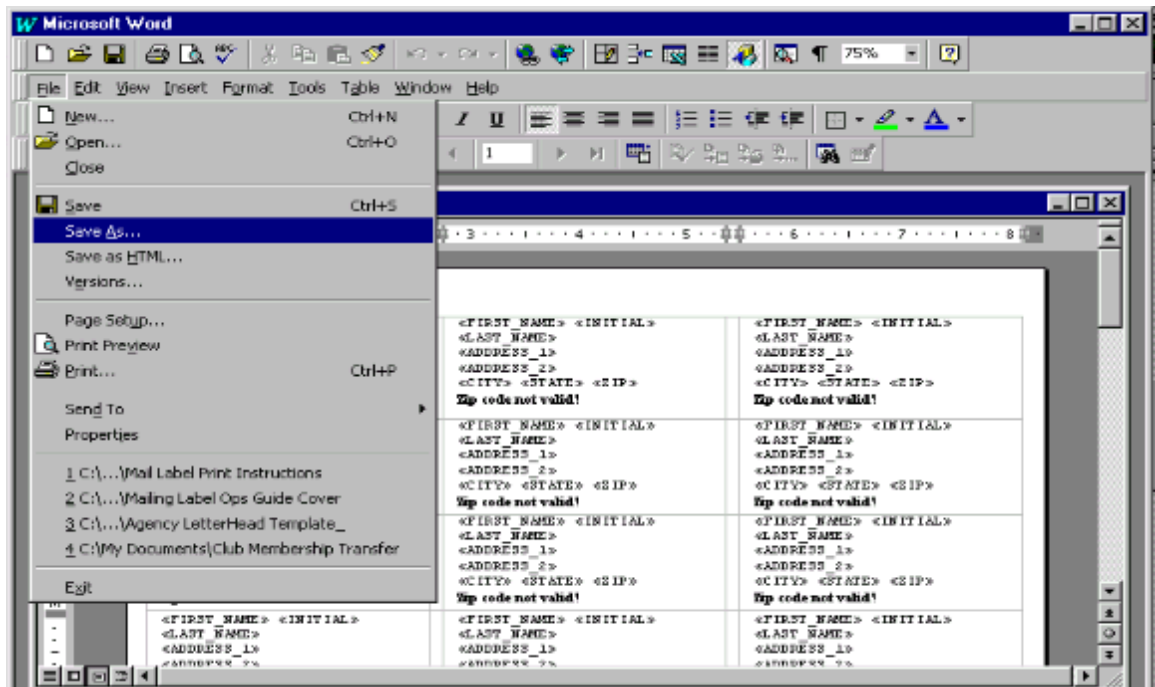
- Click on “Save”

10. To print the mailing labels:

- Load your mailing label stock in your printer

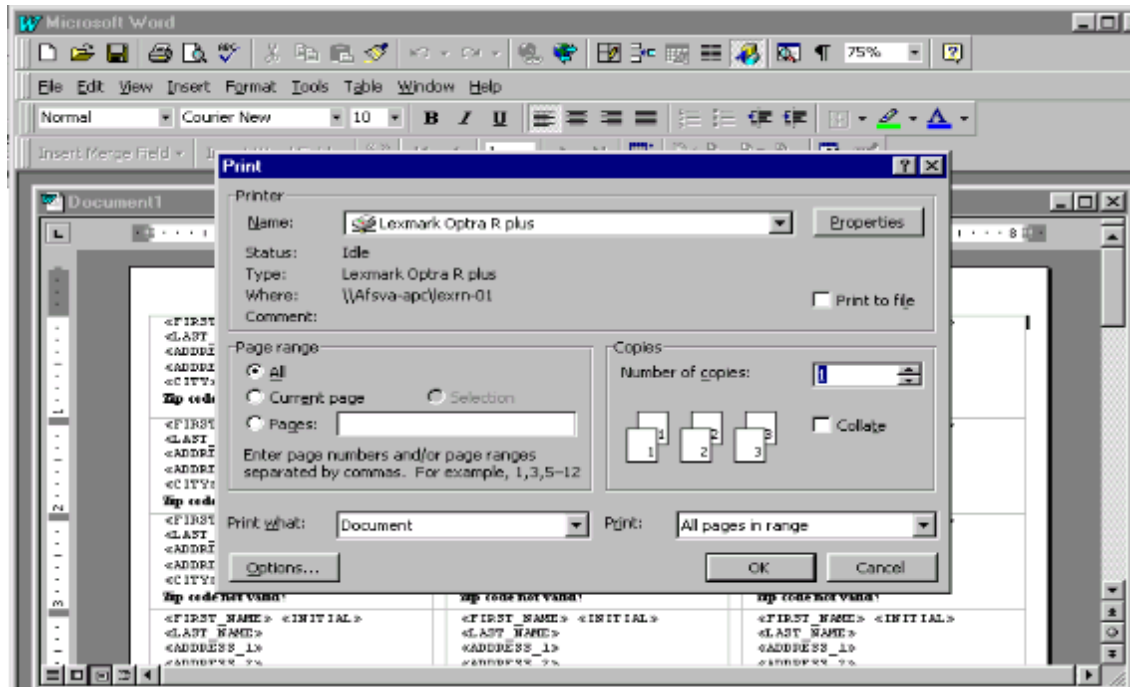


- Open the mailing label file you saved earlier



- Select “File”

- Click on “Print”



- Click on “OK”

11. Your labels will now print on the mailing label stock in your printer.

- This completes the steps necessary to produce your membership mailing labels.